Utah Comprehensive Education Funding Study:
Summary of Phases, Tasks, Methodology, & Implications[1]

PHASE I REPORT (DUE: OCTOBER 31, 2019)

Task	Basis	Methodology	Implications
Identifying Core Components of Minimum School Program	Foundation System Design	• Focus groups (Superintendents, USBE Staff) to identify minimum performance expectations for students • Survey of other states' approaches • Review current statute, strategic planning documents, and other relevant state policy • Examine available evidence on best practices	• Inform analysis of whether Minimum School Program is meeting intended purposes as defined by statute (Section 53F-2-103) • Suggesting a framework for inputs, outputs, and outcomes • Provide an assessment of alignment between identified core components and the current Minimum School Program.
Role/Balance of State and Local Contribution	Foundation System Design	• Analysis over time, compared to other states • Analysis of levies, local capacity and impact on the amount of available funding	• Inform analysis of whether Minimum School Program is meeting intended purposes as defined by statute (Section 53F-2-103)
Equity Analysis ("How Distributed")	Horizontal Equity	• Measure dispersion of education resource around the mean	• Analyze the impact of varying levels of local property tax assessments and state aids on the equitable distribution of education funding across local education agencies • Inform the discussions about the at-risk line item (below the line) currently in the school funding formula
	Vertical Equity	• Use standard student weights for different student needs (economically disadvantaged, English learner, SWD) assess how well state's funding formula adjusts funding for need	
	Fiscal Neutrality	• Measure the degree to which per student revenues and expenditures are linked to local measures of fiscal capacity such as property wealth per student	
Method of Counting Students	Foundation System Design	• Interview local, state, and national experts • Review other states approaches • Model fiscal impacts of alternative methods (potentially Phase 2)	• To determine whether the current method provides sufficient flexibility to allow for personalized learning and competency-based education
Year-round Schooling Review	System Modification	• Examine research relevant to the impact of year-round schooling on student achievement and cost reduction • Describe the current state of implementation of year-round schooling in Utah	• Inform 180/990 conversations and incorporation of competency-based learning to school programs

[1] – This study is **NOT** assessing or producing an overall adequate amount of resources for the Utah public education system.

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PHASE II REPORT (DUE: NOVEMBER 1, 2020)

Task	Basis	Methodology	Implications
Cost Function Analysis	Equity	• Analyze calculations linking performance outcomes with spending and other variables	• Examine cost differences of various educational contexts (e.g., price, economies of scale, student need)
Successful Schools	Effectiveness ("How Well")	• Analyze current spending by a set of high-performing schools • Profile the school district conditions that are facilitating or impeding progress of student performance	• Increase understanding of the relationship between spending and outcomes in Utah and inform recommendations on how resources can be targeted to improve outcomes • Identify non-monetary resources that contribute to improve student outcomes
Equalization	Foundation System Design	• Deeper examination of the impact of current equalization programs including the Voted and Board Levy Programs and the Capital Outlay Foundation Program • Examine the impact(s) on equity of requiring a local funding match	• Inform analysis of whether Minimum School Program is meeting intended purposes as defined by statute (Section 53F-2-103)

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